STUDENT FINANCIAL ASSISTANCE MODERNIZATION PARTNER

Appendix: MONTHLY MODERNIZATION PROGRAM SCORECARDS

STATUS AS OF November 29, 2000

TABLE OF CONTENTS

Scorecard Measure/Assessment	Green	Yellow	Red
Overall	• The Overall Assessment is at the discretion of the individuals completing the scorecard • No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project	• The Overall Assessment is at the discretion of the individuals completing the scorecard • No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project	• The Overall Assessment is at the discretion of the individuals completing the scorecard • No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project
Scope	• The scope has been defined, requirements are documented and authorized by the SFA and Modernization Partner • Formal change control process has been implemented and is maintaining control	• The scope has been defined and requirements have been documented and authorized by the SFA and Modernization Partner • Material scope issues have not been resolved and/or formal change control process has not been implemented	• The scope of the Task Order has not been defined and/or requirements are not documented and authorized by the SFA and Modernization Partner • Unforeseen scope growth will impact the schedule baseline • Change control process has not been implemented or is not maintaining control
Task Order	• Task Order deliverable has been accepted on time per the contract	• Task Order has not been awarded but ATP has been issued	• No Task Order has been awarded • No ATP has been issued
Schedule Performance Against Work Performed	• Project is achieving milestones on schedule or ahead of schedule	• Project may not be meeting milestones, but a catch-up plan has been developed that is accurately reflected in the workplan	• Project is not meeting milestones and no catch-up plan has been developed or reflected in the workplan
Architecture	• The Project is in full compliance with Modernization Blueprint baseline or target architecture standards or • An approved change request for all deviations from the approved architecture exists	• The Project is deviating from Modernization Blueprint baseline or target architecture standards or • A change request has been submitted but the request has not been approved	• The Project is deviating from Modernization Blueprint baseline or target architecture standards or • A change request has not been submitted and obtained
Risk	• Potential future risks have been identified and assessed; no impact is expected to the other Measures • Project risks (if any) to successfully execute the Task Order have been identified, documented and prioritized • Risk mitigation strategies are in place	• Potential future risks to other Measures have been identified and assessed; impacts are minimal • Project risks to successfully execute the Task Order have been documented, but either: • Some risks have not been adequately defined or • Mitigation strategies have not been developed for all risks	• Potential future risks to other Measures have been identified and assessed; impacts are significant • Project risks to successfully execute the Task Order have not been documented • Mitigation strategies have not been developed
Quality	• The Project has developed a documented quality plan and is successfully implementing the plan • The Project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order	• The Project has developed a documented quality plan, but significant problems are preventing successful implementation of the plan, or • The project has complied with the quality requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order, however, one or more significant program plan review issues have not been successfully resolved	• The Project has not developed a documented quality plan or • The project is not complying with the quality requirements of the Modernization Partner program plan appropriate to the work required by the Task Order
Communication/Change Management	• Communication and change management strategies are in place and are being implemented	• Minor communications issues exist • Change management approach and strategy is not complete • Information needs of some stakeholders are not being met in a timely manner	• Communications issues and change management aspects have not been documented or defined • Information needs of stakeholders are not being met
Human Resources	• Human resource needs have been documented, approved, and the appropriate resources are available • Project team has the individual and group skills needed for the particular phase • All staffing requests have been filled or have been unfilled for a short time with no impact to schedule	• Human resource needs have been documented • Some responsibilities are blurred, minor resource gaps exist and/or team lacks some skills to perform successfully, or • Unfilled staffing requests have been open for a period of time and have the potential to impact schedule	• Human resource needs have not been documented • Serious resource deficiencies exist, significant individual and team skills are lacking, or • Staffing requests have remained open for an extended period of time and project schedule has been impacted
Commercial Off the Shelf Software (COTS)	• Significant reuse of hardware, software, data, and/or process is being utilized • A Reuse review was conducted during conceptual or detailed design and all reuse issues have been resolved	• Reuse of Architecture, Design, Hardware, Software, Data and/or Process was considered, used, and candidates were identified, however, none were selected, or • A Reuse review was conducted during conceptual or detailed design and issues remain unresolved	• Reuse of Architecture, Design, Hardware, Software, Data and/or Process was not considered and candidates were neither evaluated nor used, or • A Reuse review was not conducted during conceptual or detailed design

MODERNIZATION PARTNER PROGRAM SUMMARY

	CFO			CIO								Financial Partners Channel	Schools Channel	Students Channel				Organization Transformation	
	TO 14- Financial Management System (FMS)	TO 20- CFO Transformation	TO 25- Electronic Document Management	TO 9- Intranet Release 2.0 / Content Management	TO 11- Ombudsman	TO 12- School Portal and IFAP Conversion	TO 16- Enterprise Tech Architecture	TO 18, 21, & 22- Security, Data Warehousing, and Integrated Technical Architecture	TO 32- SDLC/IPT Process Guide	TO 34- Intranet Operations	TO 35- FMS Transition	Financial Partners Transformation (FPT)	TO 19- Common Origination and Disbursement	TO 15- CRM Call Center	TO 26- CDS Simplification	TO 33- FAFSA on the Web Redesign	TO 37- Financial Analysis Support and Buildup	TO 29 & 31- SFA University	TO 30- HR Modernization Support
Overall	Green	Green	Green	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Yellow	Yellow
Scope	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green
Task Order	Yellow	Green	Green	Green	Green	Yellow	Green	Yellow	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green
Schedule Performance Against Work Performed	Green	Green	Green	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Yellow	Yellow	Green	Green	Green	Green	Green	Yellow
Architecture	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Risk	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow
Quality	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Communication / Change Management	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green
Human Resources	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Commercial Off the Shelf Software (COTS)	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

CFO
TO 14- Financial Management System (FMS)

Go Live Date: 10/01/2000
ITR: Bill Walsleben
SFA Contact: Paul Stonner
Modernization Partner Contact: Barry Weiss

October 18 Assessment	November 29 Assessment	Measure	Comments
Green	Green	Overall	The project is now focusing on Phase III.
Green	Yellow	Scope	The scope for Phase III is being defined. Some of the issues that need further definition include: determination of interface solutions versus process replacement, deviation from the Concept of Operations, determination of which project/Task Order will 'own' the work.
Yellow	Yellow	Task Order	The task order for Phase II has been awarded. Phase III, the next task order, is still in discussion.
Green	Green	Schedule Performance Against Work Performed	The deliverables for Phase II were delivered on time.
Green	Green	Architecture	The project is in full compliance with Modernization Blueprint baseline.
Green	Green	Risk	No new risks identified at this time. Mitigation strategies have been identified for all known risks.
Green	Green	Quality	ECAD will facilitate Quality Assurance and Quality Control during Phase III.
Green	Green	Communication/Change Management	The team is continuing to focus on communication and change management (internal and external to the team).
Green	Green	Human Resources	The team is assessing the appropriate staffing levels for the next phase of the project.
Green	Green	Commercial Off the Shelf Software (COTS)	The Oracle Federal Financials package was implemented.

CFO
TO 20- CFO Transformation

Go Live Date: N/A
ITR: Bill Walsleben
SFA Contact: Jim Lynch
Modernization Partner Contact: Linh Nguyen

October 18 Assessment	November 29 Assessment	Measure	Comments
N/A*	Green	Overall	The project is on track to meet requirements of the task order.
N/A*	Green	Scope	Scope has been defined and requirements are documented.
N/A*	Green	Task Order	Task order has been awarded.
N/A*	Green	Schedule Performance Against Work Performed	The due dates for deliverables have been revised and project is on schedule to meet those dates. Deliverables 20.1.1- Strategic Plan and 20.2.1- Program Management Tool Set will be delivered on December 1. The remaining two deliverables 20.3.1- Management Infrastructure Support and Working Binder and 20.4.1- CFO Competency Model and Employee Development Support are now due on December 29.
N/A*	Green	Architecture	N/A
N/A*	Green	Risk	No risks have been identified.
N/A*	Green	Quality	The project is in compliance with the requirements of the Modernization Partner Program Plan.
N/A*	Green	Communication/Change Management	Communication between the project team, the CFO office, and team leads is clear and ongoing.
N/A*	Green	Human Resources	Additional Resources have been retained.
N/A*	Green	Commercial Off the Shelf Software (COTS)	N/A

* CFO Transformation began reporting scorecards on 11/3/00 and does not have an assessment for the 10/18/00 period.

CFO
TO 25 - Electronic Document Management (EDM)

Go Live Date: N/A
ITR: Bill Walsleben
SFA Contact: Cheryl Queen
Modernization Partner Contact: Bill Walsleben

October 18 Assessment	November 29 Assessment	Measure	Comments
N/A*	Green	Overall	Best-in-Business Solution Site Visits are in progress; Organizational Communications Plan and EDM Project Plan have been delivered; and requirements gathering is in progress.
N/A*	Yellow	Scope	EDS is updating the Task Order to reflect the change in scope from EDM to a Records Management System.
N/A*	Green	Task Order	The task order has been awarded. Update in progress.
N/A*	Green	Schedule Performance Against Work Performed	The project is scheduled to achieve milestones on schedule. Best-in-Business Solution Site Visits are in progress. Deliverables 25.1.2- Organizational Communications Plan and 25.1.3- EDM Project Plan have been delivered and are being reviewed.
N/A*	Green	Architecture	N/A
N/A*	Green	Risk	The IPT Risk Team is developing a Risk Plan.
N/A*	Green	Quality	The Project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order. The IPT Quality Team is developing a Quality Plan.
N/A*	Green	Communication/Change Management	IPT coordination is on track.
N/A*	Green	Human Resources	IPT and Modernization Partner Team adequately staffed and deployed.
N/A*	Green	Commercial Off the Shelf Software (COTS)	N/A

* CFO Transformation began reporting scorecards on 11/3/00 and does not have an assessment for the 10/18/00 period.

CIO
TO 9- Intranet Release 2.0 / Content Management

Target Go Live Date: 12/15/2000
ITR: Dave Gordon
SFA Contact: Helene Epstein
Modernization Partner Contact: Greg Cornett

October 18 Assessment	November 29 Assessment	Measure	Comments
Yellow	Yellow	Overall	The content management team is continuing development and ensuring consistent implementation of functionality among applications. The development and production environments are being installed at the VDC. The site is targeted for delivery no later than 11/30.
Green	Green	Scope	The Scope has been defined and there are no changes to report.
Green	Green	Task Order	The task order has been awarded.
Red	Yellow	Schedule Performance Against Work Performed	The schedule has slipped and is being rebaselined through discussions with the Director of SFA Communications.
Green	Green	Architecture	The architecture is in compliance with target architecture standards across IFAP, School Portal and Intranet release 2.0.
Yellow	Green	Risk	Mitigation strategies have been identified for all known risks.
Green	Green	Quality	Quality is being controlled through Production Readiness Reviews being planned during the month of December.
Yellow	Green	Communication/Change Management	Communication and change management strategies are in place and are being implemented.
Green	Green	Human Resources	Human Resource needs have been documented/approved and appropriate resources are available.
Yellow	Green	Commercial Off the Shelf Software (COTS)	The project team is leveraging COTS products which are being integrated at the VDC. Integration of Autonomy search capability within the Intranet application is being addressed.

CIO
TO 11- Ombudsman

Go Live Date: N/A
ITR: Dave Gordon
SFA Contact: Helene Epstein
Modernization Partner Contact: Jim Laychak

October 18 Assessment	November 29 Assessment	Measure	Comments
Yellow	Green	Overall	The call center and Ombudsman specialist users have begun using the new OCTS 2.0 system.
Green	Green	Scope	Release 1.0 was implemented successfully on 10/30/2000. Strategies and timing for future releases are currently being discussed.
Green	Green	Task Order	The initial task order has been awarded.
Yellow	Green	Schedule Performance Against Work Performed	Seven of twelve deliverables have been approved. The remaining deliverables are targeted for approval by 12/01/00.
Green	Green	Architecture	The team is in compliance with architecture standards. The project is using Siebel and Oracle architecture.
Yellow	Green	Risk	No additional risks have been identified.
Green	Green	Quality	The project is in compliance with the Modernization Partner program plan.
Green	Green	Communication/Change Management	The initial user acceptance and training sessions have been conducted and were well received. Final training for all users took place on 10/30 and 10/31.
Green	Green	Human Resources	The team has obtained the appropriate Siebel resources to complete the work and is appropriately staffed.
Green	Green	Commercial Off the Shelf Software (COTS)	The project is leveraging the Siebel COTS application.

CIO
TO 12- School Portal & IFAP Conversion

Go Live Date: TBD
ITR: Dave Gordon
SFA Contact: Sandi Foy- McCabe
Modernization Partner Contact: Eric Campbell

October 18 Assessment	November 29 Assessment	Measure	Comments
Yellow	Yellow	Overall	Migration to production is complete. Go-live is dependent on stress testing of the School Portal & IFAP applications.
Green	Green	Scope	Scope is defined and understood by the Schools Channel, OCIO and Modernization Partner. No changes to scope have been reported.
Green	Yellow	Task Order	The task order is being modified for an extension in period of performance.
Red	Yellow	Schedule Performance Against Work Performed	Stress testing is currently underway and has extended the schedule further. Production is targeted for 12/12/2000.
Green	Green	Architecture	The architecture is in compliance with target architecture standards.
Yellow	Yellow	Risk	Post production support is still being planned.
Green	Green	Quality	Quality is being controlled through preparation for a Production Readiness Review and the System Investigation Request (SIR) process throughout the testing efforts.
Green	Green	Communication/Change Management	Change management processes are being used for integration and user acceptance testing.
Yellow	Green	Human Resources	Human resource needs have been documented and approved.
Green	Green	Commercial Off the Shelf Software (COTS)	The School Portal and IFAP teams are both making use of COTS products for their solutions. The COTS products have been integrated at the VDC in both the development/testing and production environments.

CIO
TO 16- Enterprise Tech Architecture

Target Go Live Date: 11/17/00
ITR: Dave Gordon
SFA Contact: Wayne Wright
Modernization Partner Contact: Dru Carlson

October 18 Assessment	November 29 Assessment	Measure	Comments
Yellow	Green	Overall	The installation of the development architecture and production architectures is complete, with final configuration support underway as applications complete testing on the new architecture.
Yellow	Green	Scope	The technical architecture team is effectively managing the scope of its technical infrastructure build.
Green	Green	Task Order	The task order has been awarded.
Yellow	Green	Schedule Performance Against Work Performed	The architecture build based on the revised schedule is complete.
Green	Green	Architecture	The development and production architecture products have been installed, configured, tested and stabilized at the VDC.
Yellow	Green	Risk	Implementation of all hardware and software is complete. The team is providing minor configuration support to applications, as necessary.
Green	Green	Quality	Quality reviews of the technical architecture and projects are in place.
Green	Green	Communication/Change Management	The team is in the process of developing a Technical Architecture Road-Show in collaboration with IT Management to communicate functional services. In addition, monthly scheduled Technical Architecture Open-Forum meetings have been sponsored by IT Management to communicate what the architecture provides and how it enables the business.
Green	Green	Human Resources	Staff positions have been filled to support Technical Architecture including a dedicated DBA and System Administrator support at the VDC.
Green	Green	Commercial Off the Shelf Software (COTS)	All technical functions and services are being supported successfully by COTS products.

CIO

TO 21, 22, & 39- Data Warehousing, Integrated Technical Architecture, and CFO DataMart

Go Live Date: N/A
ITR: Dave Gordon
SFA Contact: Wayne Wright
Modernization Partner Contact: Yateesh Katyal

October 18 Assessment	November 29 Assessment	Measure	Comments
Green	Green	Overall	The Integrated Technical Architecture (ITA) team deliverables are on schedule.
Green	Green	Scope	The scope for Integrated Technical Architecture (ITA) and Data Warehousing architecture projects has been defined.
Green	Yellow	Task Order	A modification is in process for the Data Warehouse (TO21) Task Order to reflect a change in scope for deliverables 21.1.6- Implementation Strategy and High Level Work Plan and 21.1.7- Implementation Strategy Business Case.
Yellow	Green	Schedule Performance Against Work Performed	All ITA deliverables have been accepted. The Data Warehousing schedule has been revised to include a Proof-of-Concept plan. CFO DataMart has been successfully deployed.
Green	Green	Architecture	The projects are implementing the enterprise standard architecture.
Yellow	Green	Risk	Mitigation strategies have been identified for all known risks.
Green	Green	Quality	The project is complying with the requirements of the program plan, appropriate to the work required by the Task Orders.
Yellow	Yellow	Communication/Change Management	The Data Warehouse project is working on defining communication requirements and alternatives with the business channels.
Green	Green	Human Resources	All staffing requests have been filled and resources are available.
Green	Green	Commercial Off the Shelf Software (COTS)	The Data Warehouse team is using Microstrategy and Informatica products to deliver the solution. These COTS products have been integrated at the VDC.

* The October 18 Assessment reported on TO 18, 21, & 22- Security, Data Warehousing, and Integrated Technical Architecture.

CIO
TO 32- SDLC/IPT Process Guide

Go Live Date: N/A
ITR: Dave Gordon
SFA Contact: Connie Davis
Modernization Partner Contact: Tom Day

October 18 Assessment	November 29 Assessment	Measure	Comments
Green	Green	Overall	The schedule for deliverables 32.1.2- SDLC Process Guide and 32.1.1-Deployment Plan has been adjusted to allow for incorporation of additional comments.
Green	Green	Scope	The scope of the project has been defined. The team has been meeting with CIO executives to validate the scope of the SDLC/IPT Process Guide.
Green	Green	Task Order	The Task Order has been officially awarded by SFA.
Green	Green	Schedule Performance Against Work Performed	The schedule for deliverables 32.1.2- SDLC Process Guide and 32.1.1-Deployment Plan has been adjusted to allow for incorporation of additional comments.
Green	Green	Architecture	Not applicable; enterprise architecture standards will be incorporated into the SDLC as appropriate.
Green	Green	Risk	No risks have been identified.
Green	Green	Quality	An independent team (Software Engineering Institute) has been retained to provide quality recommendations.
Green	Green	Communication/Change Management	An IPT process is being utilized to ensure communications. The CIO core team has been established and is continuing dialogue with other stakeholders & IPTs.
Green	Green	Human Resources	The project is staffed with the appropriate resources.
Green	Green	Commercial Off the Shelf Software (COTS)	Planning to identify potential COTS products for the implementation of the SDLC Process Guide.

CIO
TO 34 - Intranet Operations

Go Live Date: N/A
ITR: Phill Thomas
SFA Contact: Cheryl Queen / Helene Epstein
Modernization Partner Contact: Tom Schweikert

October 18 Assessment*	November 29 Assessment	Measure	Comments
Yellow	Green	Overall	The transition team is progresssing with the tasks identified in the transition plan. The Applications Management team is fully functional.
Green	Green	Scope	The scope for SFANet Applications Management is defined.
Yellow	Green	Task Order	SFANet Applications Management task orders have been awarded. However, a modification to this Task Order is being discussed.
Green	Green	Schedule Performance Against Work Performed	The team is progressing on schedule. All transition deliverables have been accepted. Deliverable 34.1.6a- Intranet Application Operations Monthly Report was delivered 11/7/00.
Green	Green	Architecture	N/A
Yellow	Green	Risk	Potential future risks have been identified and assessed.
Green	Green	Quality	The project is in compliance with the Modernization Partner program plan.
Red	Green	Communication/Change Management	With respect to Task Order requirements and scope, minor communications issues with key stakeholders existed. A plan was prepared to address this with key stakeholders and was successfully implemented.
Green	Green	Human Resources	Human Resource needs have been documented/approved and appropriate resources are available.
Green	Green	Commercial Off the Shelf Software (COTS)	N/A

* The 10/18/00 assessment reports Task Orders 34 and 35 combined. Going forward, they will be reported separately.

CIO
TO 35 - FMS Operations

Go Live Date: N/A
ITR: Phill Thomas
SFA Contact: Paul Stonner
Modernization Partner Contact: Tom Schweikert

October 18 Assessment*	November 29 Assessment	Measure	Comments
Yellow	Green	Overall	The transition team is progresssing with tasks identified in the transition plan.
Green	Green	Scope	The scope for FMS Applications Management is defined.
Yellow	Green	Task Order	FMS Applications Management task orders have been awarded.
Green	Green	Schedule Performance Against Work Performed	The team is progressing on schedule.
Green	Green	Architecture	N/A
Yellow	Green	Risk	Potential future risk to schedule has been identified and assessed; no impact is expected.
Green	Green	Quality	The project is in compliance with the Modernization Partner program plan.
Red	Green	Communication/Change Management	Communication and change management strategies are in place and are being implemented.
Green	Green	Human Resources	Human Resource needs have been documented/approved and appropriate resources are available.
Green	Green	Commercial Off the Shelf Software (COTS)	N/A

* The 10/18/00 assessment reports Task Orders 34 and 35 combined. Going forward, they will be reported separately.

FINANCIAL PARTNERS CHANNEL
Financial Partners Transformation (FPT)

Go Live Date: N/A
ITR: Chris Ward
SFA Contact: John Reeves
Modernization Partner Contact: Reginald Ewing/ Nancy Krecklow

October 18 Assessment	November 29 Assessment	Measure	Comments
Yellow	Green	Overall	Several meetings have been held with the General Manager to assist in the task order proposal approval process for the next phase of work.
Green	Green	Scope	The scope of the Financial Partners Transformation program and Modernization Partner support has been defined and agreed to by all parties.
Yellow	Yellow	Task Order	Task Order 40 is being updated based on comments from the GM and will be resubmitted to the COTR for approval on 12/01. The Statement of Objectives for the FP Data Mart was submitted to the COTR on 11/15 and the corresponding task order (TO 50) is in development. A meeting with the GM will take place to finalize the direction of the Data Mart for Financial Partners and the Management Transformation Business Cases.
Yellow	Yellow	Schedule Performance Against Work Performed	Task orders and statements of objectives are being developed for the FP Data Mart and the Transformation Management projects. However, the business cases for these projects have not been approved.
Green	Green	Architecture	A task order for the FP Data Mart is in development and will use the previously identified architecture which consists of Oracle, Informatica, and MicroStrategy products.
Green	Green	Risk	Risks will be documented in the Task Order.
Green	Green	Quality	The projects will comply with the requirements of the program plan, appropriate to the work required by their Task Order.
Green	Green	Communication/Change Management	Communication and change management strategies have been incorporated as part of the project's current and future work plan.
Green	Green	Human Resources	There are no outstanding Human Resource needs.
Green	Green	Commercial Off the Shelf Software (COTS)	Informatica and MicroStrategy products will be implemented for the Data Mart. No application COTS are currently planned.

SCHOOLS CHANNEL
TO 19- Common Origination and Disbursement

Go Live Date: N/A
ITR: Katie Crowley, Gene Murphy
SFA Contact: Mary Haldane, Denise Merchant
Modernization Partner Contact: Katie Crowley, Gene Murphy

October 18 Assessment	November 29 Assessment	Measure	Comments
Yellow	Yellow	Overall	The overall assessment for implementing the COD Phase II project plan is good. Schedule slippage is a key contributor to the yellow score (refer to Schedule Performance Against Work Performed).
Green	Green	Scope	Schools channel representatives and the Modernization Partner defined and agreed on the TO scope.
Green	Green	Task Order	The Task Order has been awarded.
Yellow	Yellow	Schedule Performance Against Work Performed	Required revisits with potential partners were necessary to answer final key questions prior to completing deliverable 19.1.3- Preferred Solution Selection. Revisions to dates (replan) of three deliverables (19.1.3- Preferred Solution Selection, 19.1.7- Implementation Plan and 19.1.9- Business Case) have been informally agreed to. Task order modifications are now in progress. The current task order expires 11/15 - the proposal is for extension through 2/28/01.
Green	Green	Architecture	The Project is in full compliance with the Modernization Blueprint baseline and target architecture standards. The project has not defined any architecture changes.
Green	Green	Risk	Project risks to successfully execute the Task Order of work have been documented and mitigation strategies have been defined.
Green	Green	Quality	SFA participation continues to increase. Workgroups composed of SFA and Modernization Partner personnel have been established and kicked-off. These workgroups incorporate existing business functional expertise with COD goals.
Yellow	Yellow	Communication/Change Management	While communication strategies have been incorporated as part of the project's future work plan and resources have been identified to focus on change management issues, current change management expert efforts will focus on impacts to the SFA organization as a result of COD implementation. Communication to SFA Schools staff has not been initiated in earnest as previously planned.
Green	Green	Human Resources	Current human resource needs are met. The project team filled the last outstanding position for financial analysis support to assist in the development of the COD Implementation (Phase III/IV) Business Case. Two recent staff additions have strengthened our technology team, as well as key knowledge required for development of the implementation plan.
Green	Green	Commercial Off the Shelf Software (COTS)	A review of COTS products has been incorporated into the project's work plan.

STUDENTS CHANNEL
TO 15- CRM Call Center

Go Live Date: N/A
ITR: Martin Renwick
SFA Contact: Dena Bates
Modernization Partner Contact: Jim Phillips

October 18 Assessment	November 29 Assessment	Measure	Comments
Green	Green	Overall	The CRM / Call Center IPT is on schedule and has completed Current Environment, Best Practice, Gap Analysis, and Solution Selection Phases. The Solution Recommendation Phase is completed. Meetings with project leadership and the IPT Sponsor have been held. The Solutions Recommendations deliverable was approved. Business case development is underway. In addition, the project is transitioning General Managers.
Green	Green	Scope	There have been no scope changes for the IPT.
Green	Green	Task Order	The task order has been awarded.
Green	Green	Schedule Performance Against Work Performed	The Project finish date has been extended to December 31, 2000.
Green	Green	Architecture	The Project is in full compliance with Modernization Blueprint baseline or target architecture standards. This project involves assessment and definition of CRM/Call Center reengineering options and does not affect architecture. Meetings with team members from other Modernization Partner projects are being conducted to ensure that the architecture planning for the next phase of work fits the overall vision of the program.
Green	Green	Risk	No risks are currently identified.
Green	Green	Quality	The Project has developed a quality plan and the project is complying with the requirements of the program plan, appropriate to the work required by the Task Order. Deliverable content has been reviewed by independent, outside CRM subject matter experts.
Green	Green	Communication/Change Management	Communication strategies have been incorporated as part of the project's work plan. A plan for reporting findings has been incorporated into project plan and process maps. All project findings have been communicated to stakeholders. A CRM communications Road Show has been conducted with the Schools and Students Channel, Contracts & Acquisitions, Human Resources, Ombudsman, and the COO.
Green	Green	Human Resources	Staffing requirements have been satisfied for the IPT and subteams. All outstanding staffing requests have been filled. Interaction Associates is the sub-contractor for faciliation and process mapping activities.
Green	Green	Commercial Off the Shelf Software (COTS)	The CRM application has been selected. The Ombudsman CRM application will be reviewed by the IPT Core Team to leverage the work completed.

STUDENTS CHANNEL
TO 26- CDS Simplification

Go Live Date: 11/17/00
ITR: Martin Renwick
SFA Contact: Jennifer Douglas
Modernization Partner Contact: Kerry Trahan

October 18 Assessment	November 29 Assessment	Measure	Comments
Green	Green	Overall	Implementation was accomplished on 11/17/00.
Green	Green	Scope	The scope has been defined. Requirements are documented and authorized by SFA and Modernization Partner.
Green	Green	Task Order	The Task Order has been awarded.
Green	Green	Schedule Performance Against Work Performed	The software went into production on 11/17/00.
Green	Green	Architecture	The Project is in full compliance with Modernization Blueprint baseline or target architecture standards. The project has not defined any architecture changes.
Green	Green	Risk	Project risks to successfully execute the Task Order of work have been documented, and mitigation strategies have been defined.
Green	Green	Quality	Deliverables have been peer reviewed and reviewed by independent SQA reviewers. SQA reviews on project management are completed regularly.
Green	Green	Communication/Change Management	Communication strategies have been incorporated as part of the project's work plan. Joint Application Development sessions for requirements and detailed design are taking place among SFA, Andersen Consulting, ACS, and EDS.
Green	Green	Human Resources	Resources are fully staffed.
Green	Green	Commercial Off the Shelf Software (COTS)	A data warehouse COTS product is now being utilized.

STUDENTS CHANNEL
TO 33- FAFSA on the Web Redesign

Go Live Date: N/A
ITR: Martin Renwick
SFA Contact: Jeanne Saunders
Modernization Partner Contact: Martin Renwick / Grace N. Yakubisin

October 18 Assessment	November 29 Assessment	Measure	Comments
Green	Green	Overall	The project is progressing on schedule.
Green	Green	Scope	The scope for Release 6 has been defined, requirements are documented and authorized by SFA and Modernization Partner.
Green	Green	Task Order	The task order has been awarded. The task order for the next phase of the project is currently in the approval process.
Green	Green	Schedule Performance Against Work Performed	The first phase has been completed.
Green	Green	Architecture	We are currently meeting with CIO to determine how to incorporate the Internet Standards into our project. The core team has discussed the options with CIO and documented the advantages and disadvantages of each option.
Green	Green	Risk	Potential future risks have been identified and assessed. Risk mitigation strategies are in place.
Green	Green	Quality	The project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order.
Green	Green	Communication/Change Management	Communication strategies are in place and are being implemented. Change management strategies for the next task order are being defined.
Green	Green	Human Resources	There are no outstanding staffing requests at this time.
Green	Green	Commercial Off the Shelf Software (COTS)	There are no COTS packages available for this task order.

STUDENTS CHANNEL
TO 37- Financial Analysis Support and Buildup

Go Live Date: N/A
ITR: Martin Renwick
SFA Contact: Jennifer Douglas
Modernization Partner Contact: Louella Gorman

October 18 Assessment	November 29 Assessment	Measure	Comments
Green	Green	Overall	We have revised the delivery date of Phase II due to additional time needed to conduct financial analysis and scheduling conflicts.
Green	Green	Scope	The Task Order scope has been defined and agreed to by Students Channel representatives.
Green	Green	Task Order	The Task Order has been awarded.
Green	Green	Schedule Performance Against Work Performed	The project will achieve Task Order milestones on schedule.
Green	Green	Architecture	N/A
Green	Green	Risk	Potential future risks have been identified and assessed; no impact is expected to the other Measures.
Green	Green	Quality	The project plan is being executed as intended. The project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order.
Green	Green	Communication/Change Management	N/A
Green	Green	Human Resources	The project is adequately staffed.
Green	Green	Commercial Off the Shelf Software (COTS)	N/A

ORGANIZATION TRANSFORMATION
TO 29 & 31- SFA University

Go Live Date: N/A
ITR: Kim Morris
SFA Contact: Anne Teresa
Modernization Partner Contact: Doreen Barrett

October 18 Assessment	November 29 Assessment	Measure	Comments
Yellow	Yellow	Overall	Client expectations have been clarified for the Front- to-Back Training Course development. TO 31- Front-to-Back will be modified to include web-based tool development and training delivery coordination.
Yellow	Yellow	Scope	The scope of work for SFA University Modernization Support is currently being revisited to include additional training delivery by a sub-contractor for SFA University employees in the areas of program planning/management and facilitation skills.
Green	Green	Task Order	TO 29- Modernization Support and TO 31- Front-to-Back have been awarded.
Green	Green	Schedule Performance Against Work Performed	Scheduled performance against work performed is as planned and on target.
Green	Green	Architecture	The project is in full compliance with the Modernization Blueprint baseline and target architecture standards. The project has not defined any architectural changes.
Yellow	Green	Risk	Risks associated with completion of Front-to-Back training have been addressed by the client and mitigation strategies have been implemented with client involvement.
Green	Green	Quality	The project is complying with the requirements of the Modernization Partners program plan, appropriate to the work required by the Task Order.
Green	Green	Communication/Change Management	A communication strategy, that identifies stakeholders and processes for involvement of sponsors and subcontractors in the design, development, and implementation of products, has been developed.
Yellow	Green	Human Resources	The current resources allocated to TO 29 & 31 are appropriate for the work required.
Green	Green	Commercial Off the Shelf Software (COTS)	The team will focus on identifying appropriate web-based materials to be incorporated into a web-based tool at a later point.

ORGANIZATION TRANSFORMATION
TO 30- HR Modernization Support

Go Live Date: 12/04/00
ITR: Kim Morris
SFA Contact: Calvin Thomas
Modernization Partner Contact: Kim Morris

October 18 Assessment	November 29 Assessment	Measure	Comments
Green	Yellow	Overall	The Performance Development Process anticipated rollout date of December 4th has been postponed due to lack of Union feedback; however, the team is now focusing on efforts to refine the SFA Skills Catalog.
Green	Green	Scope	HR Modernization Support Task Order reflects work efforts currently underway.
Yellow	Green	Task Order	Currently working on a modification to the Task Order to ensure all work efforts are covered and to include additional support requested by the client.
Green	Yellow	Schedule Performance Against Work Performed	The Performance Development Process anticipated rollout date of December 4th has been postponed due to lack of Union feedback. The SFA Director of HR will be meeting with the Union to obtain feedback on the Performance Development Process and the team will incorporate any changes to the process as appropriate. The Performance Development Process will be implemented (communications, pilot, training and roll-out) as soon as 'approval' is granted to the process from Office of General Counsel, Department of Education's HR Group, Office of Personnel Management and Union. Performance is progressing as scheduled. The team will be scheduling working sessions with Channel/Unit Leadership Teams to define proficiency levels for the skills identified for their area.
Green	Green	Architecture	The project is in full compliance with the Modernization Blueprint baseline and target architecture standards.
Yellow	Yellow	Risk	Risks to a successful execution of the Task Order have been documented, and mitigation strategies have been defined. The team has incorporated feedback from the Office of General Counsel, Office of Personnel Management, and Department of Education HR Group on the Performance Development Process (PDP). At this time, we are awaiting Union feedback to support their request to bargain on the process based on a draft of the Description Document. SFA HR will determine the Union's position relative to the PDP and will work to mitigate against any challenges.
Green	Green	Quality	The project is complying with the requirements of the program plan, appropriate to the work required by the Task Order.
Yellow	Green	Communication/Change Management	Communication and change management strategies have been identified and incorporated into the project work plan. A communication plan regarding how the Performance Development Process complements Performance Management will be drafted and sent to SFA employees in an Inside SFA article.
Green	Green	Human Resources	The Project team has identified resources and skills needed and immediate staffing needs have been met.
Green	Green	Commercial Off the Shelf Software (COTS)	SFA has selected Perform.com as its Application Service Provider (ASP) solution for the new Performance Development Process.